



UNIVERSITY OF RICHMOND
Robins School of Business™



Stanley S. Watts Lectureship
September 20, 2023
University of Richmond
Robins School of Business

6:00 P.M. | Program
7:00 P.M. | Networking Reception



Rebecca Fender, CFA
Director of Investor Relations
Spider Management

Rebecca Fender is the Director of Investor Relations for Spider Management. She has 24 years of research, management, and investment experience and joined Spider Management in 2022. Prior to joining Spider, she published studies on the future of the investment industry as a member of the industry research team at CFA Institute, and she directed the organization's flagship annual conference. Previously, Rebecca worked at BlackRock managing client accounts for pension funds and endowments. She earned her undergraduate degree in economics from Princeton University and holds an MBA from the Darden School at the University of Virginia. She is a CFA charterholder and serves on the board of the Veritas School.

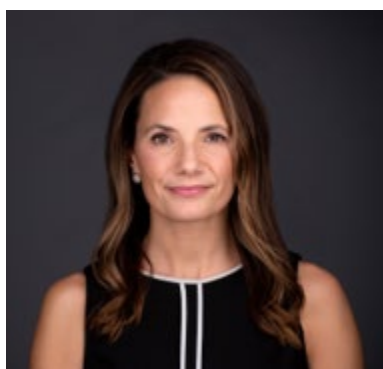


Alex Kohnert, '20

Alternative Investment Sales Specialist

UBS

Alex Kohnert is an Alternative Investment Sales Specialist at UBS where she is responsible for hedge fund and private market fund sales distribution to high-net-worth clients. Before joining the AI Sales desk, Kohnert completed the two-year GTP rotational analyst program across UBS' wealth management division. She graduated from the University of Richmond in 2020, receiving a B.S.B.A. with a concentration in finance and a B.A. in economics and French.



Katie Stockton, '97

Founder and Managing Partner

Fairlead Strategies, LLC

Katie Stockton, CMT, is the founder and managing partner of Fairlead Strategies, LLC, an independent research firm and investment advisor focused on technical analysis. She is also the portfolio manager for the Fairlead Tactical Sector ETF (TACK) and sits on the Board of Directors for Cary Street

Partners. Before forming Fairlead Strategies, Stockton spent more than 20 years on Wall Street providing technical research and advice to institutional investors. Most recently, she served as chief technical strategist for BTIG and chief market technician at MKM Partners. She also worked for technical strategy teams at Morgan Stanley and Wit Soundview.

With help from the Fairlead Strategies team, Stockton provides research and consulting services to institutions and individuals. Stockton received her Chartered Market Technician (CMT) designation in 2001, and later served as vice president of the CMT Association from 2012 to 2016.

Stockton graduated with honors from the University of Richmond with a B.S.B.A., and she now serves on the business school's Executive Advisory Council. Katie frequently shares her views on CNBC as an official CNBC contributor, as well as other financial media outlets.



Karen Welch
Managing Director of Investments
Spider Management

Karen Horn Welch has 24 years of investment industry experience and joined Spider Management in 2016. Welch works closely with the CIO in leading asset allocation and investment decisions across the portfolio.

Prior to joining Spider, Welch worked at Stanford Management Company from 2007 through 2015 where she served as director, portfolio strategy and previously as director, public equity, leading asset allocation, strategy, and the endowment's public equity and long/short hedge fund portfolio. Prior to Stanford, Welch worked at the David and Lucile Packard Foundation, Stanford Graduate School of Business, Harvard University, and J.P. Morgan.

Welch holds a Master of Public Administration with a focus on international economics from Harvard University and a Bachelor of Arts with honors in economics and international relations from Bucknell University. She is a member of Phi Beta Kappa and serves on the Investment Committee of CommonSpirit Health Board of Stewardship Trustees and the Board of St. Christopher's School.

*Presented by the Robins School of Business in collaboration with Scholars of Finance,
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